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The Gerontology Institute

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The First Years: 1984-1987

College of Public
and Community Service
University of Massachusetts at Boston

88-1/479

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The Mission of the Institute

Founded in July 1984, with the support of the Governor and the Massachusetts State Legislature, the overall mission of the *Gerontology Institute, University of Massachusetts at Boston*, is to:

- *focus attention on the economic, social, and political issues confronting the increasing elder population:*
- *identify significant societal roles for older people by encouraging them to utilize their ability to conduct applied research, to shape policy, and to influence the public process.*

The underlying premise of the Institute's mission is that older people can play vital roles in the daily work of human service agencies and in the development of social policy at the local, state, and federal levels. The experience, talents, wisdom, and viewpoints of older people can be extremely valuable as individuals, communities, and society prepare for an older, more diverse population.

The Gerontology Institute was established at the College of Public and Community Service in order to further the University's commitment to the study and development of aging policy as well as to create opportunities for older persons to become directly involved in the critical decisions which affect their lives. Since 1980, the College has provided accredited training in Gerontology to over 250 persons through the *Frank J. Manning Gerontology Certificate Program.* More than two thirds of these graduates are over 60 years of age. Students learn about the aging process, the economics of aging, programs serving the elderly, approaches to the direct care of the aged, survey research methods, and the formulation of social policy.

The establishment of the Institute in 1984 provided a vehicle for graduates of the Gerontology Certificate Program to utilize their learning in addressing important social and economic issues affecting the aging population. In addition, the Institute has created a structure for pursuit of scholarly and applied research in the field of social gerontology, as well as a vehicle for the provision of technical assistance and consultation to civic and community organizations involved in issues concerning the elderly.

During the first years of its existence, the Gerontology Institute has worked with older people to convert "retirement years" into opportunities for continuous growth and learning, while simultaneously seeking to re-examine social, political, and economic roles for

elders in society. It is hoped that through such engagement of older individuals, the Institute has inspired a more positive attitude in society towards its aging population.

Since 1984, the mission of the Institute has been carried out through four distinct but interrelated endeavors:

- First, by means of issue analysis and policy development, the Institute has explored the concerns of the elderly and promoted policies and programs to address identified needs.
- Second, through research, analysis, and the publication of relevant studies and reports, the Institute has contributed to the literature and data available to decision-makers.
- Third, academic inquiry into various facets of social gerontology has been promoted through the operation of two fellowship programs.
- Fourth, technical assistance has provided those in the field with insight and expertise in various aspects of gerontological practice.

A summary of each of these four endeavors is provided in the following pages.

Issues Analysis and Policy Development

One of the primary purposes of the Gerontology Institute is to identify and examine local, state, and national issues of serious concern to an aging society. This is accomplished by conducting applied research, producing policy reports, convening conferences and seminars, training elders to participate in community research projects, examining state and federal legislative activities, and working with coalitions organized to advance public policy initiatives.

During its first years, the Institute directed several major studies and published policy reports concerning housing, institutional long-term care, demographics, economics of aging, health care, retirement, and the impact of the federal budget on elders. The purpose was to focus attention and resources on issues of public importance to elders. For example, the Institute assumed a central role in convening a task force to review access, financing, and quality of care in the nursing home industry. The task force, which was comprised of elder advocates, state administrators, and representatives of the nursing home industry supported a number of legislative initiatives to improve the nursing home system. Additionally, the Institute has joined organizations such as *The Massachusetts Association of Older Americans, The Executive Office of Elder Affairs, OMB Watch,* the *City of Boston,* and *The Adaptive Environments Center* in sponsoring conferences on caring for caregivers, nutrition and the elderly, access to nursing home, the impact of federal budget reductions, the impact of DRGs, and financing home adaptations. (See Appendix F, on page 37.) In addition, the Institute also has sponsored a number of symposia and addresses on various issues of aging. Presenters have included the former Representative Shirley Chisholm, former Senator Jennings Randolph, Dr. Jacqueline Jackson, Dr. James Birren, Dr. Fernando Torres-Gill, The Honorable Minister of Health Brandford Taitt from Barbados, and Thomas Simon from the German Democratic Republic.

A major vehicle used by the Institute to advance discussion is the *Public Policy Internship Program*. This Program, along with the *Federal Study Program*, makes concrete the Institute's commitment to the structural involvement of older people in its work.

The Public Policy Internship Program

The purpose of the Public Internship Program is to provide an opportunity for Gerontology Certificate Program graduates to take a direct role in important social issues affecting the elderly. The Internship Program combines university-accredited formal training and the provision of research and technical assistance to community organizations. Since the Program's inception in the spring of 1985 over 60 older persons have participated in the Internship Program. They have contributed more than 12,000 hours of work on behalf of the elderly community and have produced six research reports. (A listing of participants is contained in Appendix B on page 31.) Interns have worked in teams on the following issues:

- Housing and Community Development
- Legal Rights
- Health Care Policy
- Older Women's Economic Issues
- Demographics

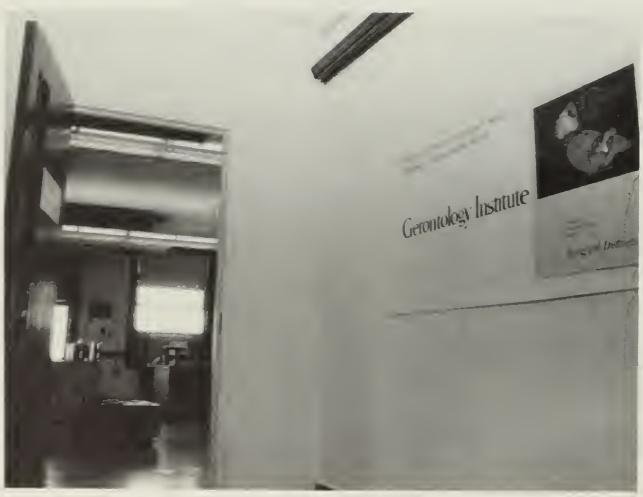
A brief summary of each Internship is presented in the following pages:

HOUSING AND COMMUNITY DEVELOPMENT

Interns completed an extensive community survey to identify and document the housing status and economic needs of older residents of the Riverside and Cambridgeport neighborhoods of Cambridge, Massachusetts. The project was conducted at the request of the Riverside/ Cambridgeport Community Corporation, the local community development corporation, and consisted of interviewing 103 randomly selected older residents of the neighborhoods. The Interns, under the supervision of Institute Senior Fellow Justin Gray, participated in the development of the survey's instrument and selection of the sample, interviews, analysis of data, and in the development of the final report, entitled *Older Residents of Riverside and Cambridgeport: Recommendations for a Population at Risk.*

As a follow-up, a second team of Interns conducted an assessment of, and reasons for, the economic changes taking place in a 130-acre parcel of land in the Cambridgeport neighborhood. Work included a survey of the business community, and research and analysis of the impact of increasing high-tech development and the decrease of traditional manufacturing jobs. The result of this work was the publication of the report and recommendations entitled *Land, Jobs and Business Development: The Changing Character of the Cambridgeport Industrial District*, which was presented to neighborhood organizations and the Cambridge City Council.

The 1988 Housing Internship examines the economic changes taking place in Boston's North End and their effect on elders in that neighborhood.



LEGAL RIGHTS

Public Policy Interns participated in a legal training program provided by the CPCS Law Center of the University of Massachusetts at Boston. Interns provided voluntary staff assistance to attorneys at several poverty law centers in the Boston area. Also in conjunction with the Law Center, another group of Interns examined two issues of vital importance to elders: discrimination against aging older workers, and the impact of the Diagnosis Related Groups (DRG) system in Massachusetts.

The 1988 Legal Interns are continuing to focus on age discrimination in the workplace with the goal of strengthening the state's ability to ensure protection of older workers.

HEALTH CARE POLICY

Interns examined the feasibility of developing a hospice insurance benefit as part of a Medex Home Health benefit. With the assistance of Consumer Health Advocates, Inc., and the Hospice Federation of Massachusetts, a survey was completed comparing the costs sustained in the final four months of life in traditional medical settings to the costs sustained by persons utilizing the home health benefit package of the Blue Cross Medex Program.

The 1988 Health Care Policy Interns are preparing a series of training sessions for elders in Massachusetts focusing on the issues of out-of-pocket medical expenses, mutualization of Blue Cross, and changes in Medigap insurance brought about by National Catastrophic Insurance Legislation.

OLDER WOMEN'S ECONOMIC ISSUES

Interns completed an examination of economic issues affecting older women in Massachusetts. In addition to analyzing socio-economic data relevant to this population, Interns reviewed state laws and regulations which adversely impact older women. Based on this research the group published a report entitled *The Economic Status of Older Women in Massachusetts*. In addition, the Interns, in conjunction with the Older Women's League, developed a legislative action agenda including support of a state-funded Respite Care Program which was subsequently approved by the State Legislature.

The 1988 Older Women Interns are examining the potential development of spousal impoverishment legislation to protect elders financially in the face of long-term illness of a spouse.

DEMOGRAPHICS

Interns have participated in a public education project initiated in response to the recent Institute publication *Older Neighbors—Aging in Eastern Massachusetts*. The Project is designed to assist state and local leaders in addressing the many policy and program issues raised as a result of the significant growth of the population 65 and over in Eastern Massachusetts. Interns are involved in the distribution of the report and in conducting regional and community briefings for public officials, policy-makers, and service providers concerning implications of the increasing aging population.

THE FEDERAL STUDY PROGRAM

In conjunction with the *Close-Up Foundation*, the Institute annually selects graduates of the Gerontology Program to spend a week in Washington, D.C. to view and participate in the national policy-making process. Candidates are selected on a competitive basis and make a commitment upon return to work with the Institute on a specific national issue. The 1987 Foundation participants have focused on catastrophic health care insurance. (the 1986 and 1987 list of awardees is presented in Appendix C.)

Research, Analysis and Publication

Since its inception in 1984, the Institute has become a recognized source of applied policy research for state decision-makers. The Institute engages in research yielding insight into the lives of older persons, the service delivery system, and public policy initiatives aimed at improving the quality of life of older people and their families. The research reports completed to date include the following:

Land, Jobs and Business Development: The Changing Character of the Cambridgeport Industrial District. July 1987.
This report presents an impact analysis of the rapidly changing business economy in the District, its effect on the jobs available, its impact on the neighborhood, together with recommendations to the City concerning business development, job creation, and job training.

Catastrophic Health Care: An Analysis of the 1987 Congressional Debate. July 1987.
This publication presents an analysis and review of the major catastrophic insurance plans under consideration by Congress and federal policy-makers, and makes recommendations for universal long-term health care coverage.

The Economic Status of Older Women in Massachusetts. May 1987.
This report profiles the economic status of women in their later years. An analysis of 1980 census data is presented which indicates that 72% of older women in Massachusetts report incomes below $6,000; the median for older women is $4,149; nearly three-quarters of institutionalized elderly are women; and older women of color face the most difficult economic situation. The report also briefly outlines a number of state legislative initiatives which affect the economic needs of older women.

Older Neighbors—Aging in Eastern Massachusetts. March 1987.
This report, prepared for local decision-makers, is a demographic study of the elderly population of Eastern Massachusetts. Race, ethnicity, geographic distribution, migration, marital status, living arrangements, income, poverty, housing, employment, education, and health status are reviewed. Findings indicate that two thirds of all Massachusetts residents 65 years and older live in this section of the state although it comprises only one third of the state's land mass.

Aging With Ability: A Report on the 55 to 74 Year Old Population in The Metrowest Area. January 1987.
This report provides a description and analysis of a survey of retirees and pre-retirees in the Metrowest Boston area of Massachusetts. The study assesses the needs, interests, and capabilities of 55-74 year olds and describes the expectations and realities of retirement of both pre- and post-retirees. The report, commissioned by *Project REWARD*, an organization concerned with retirement options and opportunities, and funded in part by the Villers Foundation, provides a series of findings and recommendations which the community has been able to utilize in responding to its older population.

Licensed Lodging Houses, City of Cambridge—Report and Recommendations. November 1986.
An assessment of licensed lodging houses in Cambridge, Massachusetts is given in this report. Study findings indicate that lodging houses provide an important source of housing to many people who live on limited or fixed incomes. In the past few years these lodging houses have undergone a rapid conversion to other uses in the City, primarily condominiums. Recommendations related to preservation of this type of housing are provided.

Older Residents of Riverside and Cambridgeport: Recommendations for a Population at Risk. September 1986.
This report provided documentation of the housing status and needs of older residents of Riverside and Cambridgeport and was produced for the *Riverside/ Cambridgeport Community Corporation (R/CCC)*.
The study portrays a long-term but primarily low-income population whose ability to remain in the neighborhood is severely threatened by the area's current volatile housing market. The report recommended specific measures to R/CCC and the City of Cambridge to protect elderly neighborhood residents from displacement.

Nursing Home Residents: Issues in Adjusting to a New Environment. September 1986.
This discussion guide was developed for use at a conference co-sponsored by the *Gerontology Institute* and the *Massachusetts Association of Older Americans.* The conference was entitled "Rethinking the Nursing Home System: Access, Quality, and Financing." The guide resulted from interviews with 120 residents of nursing homes in Eastern Massachusetts.

Leaders of the Aging Movement: Biographical Sketches of Frank J. Manning, Anna V. Brown, Reverend Edward L. Peet. September 1986.
This publication sketches the lives of three influential participants in the "Senior Power" movement in the United States. The biographies, written collectively by students in the Gerontology Program, trace the lives of Frank J. Manning, Anna Brown, and Reverend Edward Peet through their personal development as social activists and elder leaders in the aging movement. Two of these leaders, Frank J. Manning and Anna V. Brown, are now deceased.

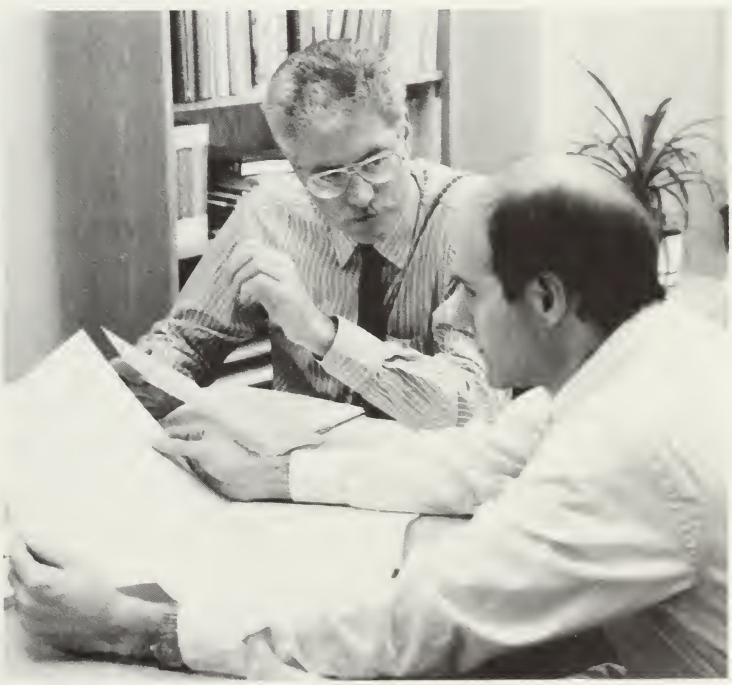
Access to Nursing Homes—The Experience of Families. May 1986. This report focused on the experience of families seeking to obtain long-term care for elderly relatives in Massachusetts. The study identifies the difficulties that families have in securing a nursing home bed of choice. The report's recommendations identify state policy initiatives which could respond to the systematic problems identified.

The Technical Analysis of the Impact of FY 1986 Federal Budget Proposals on the Elderly in Massachusetts. July 1985.
This report examined the range of federal programs which currently serve the Commonwealth's older population and detailed the implications of budgetary reductions. Data are based on analysis of the Fiscal Year 1986 federal budget presented to Congress by President Reagan as well as proposed changes in Social Security benefits.

WORKS IN PROGRESS

Currently under development are additional Institute publications focusing on:

- "The Health Care Utilization Practices of Hispanics in the United States"
- "Experiences of Elders Requiring Health Care Services Following Hospital Discharge"
- "Economic Status of Older Women in Massachusetts" (a second edition utilizing recent census projections)



Fellowship and Scholarly Activity

As an academic institution, the Gerontology Institute is strongly committed to the pursuit of scholarship in the field of social gerontology. In addition to the work of the staff, the Institute sponsors two distinct Fellowship programs which provide an opportunity for academicians, policy-makers, service providers, and graduates of the Gerontology Program to pursue research and professional activities in social gerontology.

THE COMMUNITY FELLOWS PROGRAM

The *Community Fellows Program* was established in 1985 to encourage scholarly research, analysis, publication, and practical application in the field of social gerontology. Candidates are selected on the merit of their proposed project and a demonstrated knowledge of and commitment to elderly issues. Each Fellow is required to complete a specific product related to a social policy area. A stipend or the equivalent is made available to each Fellow along with support services of the Institute. Fellows also participate in a monthly seminar, and receive the technical support of Dr. Robert Morris, Institute Senior Fellow, and Franklin Ollivierre, New England Director of the U.S. Administration on Aging.

The names of the Community Fellows and a brief summary of their projects are listed below.

1985 Community Fellows

Joy Castello, M.S.W.
Topic: *"Life Change and Social Readjustment Among Older Adults Migrating to the Boston Area from the Caribbean Countries After Age Fifty"*

This survey was undertaken to examine social readjustment factors (role loss, dependency needs, interaction patterns) of older adults migrating to the Greater Boston area from Caribbean countries. This population has moved to the area in increasing numbers in the past 20 years as a result of economic decline in the Caribbean region, and because of the region's tradition of retirement at 55 to 60 years of age.

Miriam K. Campbell, Ph.D. and Steven J. Dubnoff, Ph.D.
Topic: *"The Economic Status of Boston's Elderly"*

A survey of Boston's elderly population was conducted along with an analysis of the City's cost of living and other socio-economic factors. The research was undertaken in order to determine the self-reported amount of income needed to sustain Boston elders and the distinguishing characteristics of those unable to do so. The policy implications of these findings were explored.

Tom Chung, Ph.D.

Topic: "The Role of Cultural Differences in Client Satisfaction of Elderly Home Care Services—The Case of the Chinese Elderly"

A survey of 60 Chinese and 60 non-Chinese recipients of home care services was conducted to explore the relationship between cultural style and satisfaction with home care services. Variables of age, degree of physical confinement, and residential status were controlled.

Marjorie Glassman, M.S.W.

Topic: *"Elder Abuse Legislation and Rights of Older Adults Leaders"*

An analytical paper was prepared which discussed the ethical implications and consequences of establishment of a social service system which uses legal authority to intervene in the life of adults past a specific designated age.

Manual Haendler, M.A. and Odessa Smith

Topic: *"Leadership training for minority and low income senior citizens"*

A leadership training program was developed to assist minority elders in assuring leadership roles in community organizations, boards, and agency committees.

Richard Hogarty Ph.D.

Topic: *"Preparing a video on state and federal programs affecting the aging population"*

An instructional videotape script was developed concerning policy-making processes of the state and federal government for use in a competency-based educational setting.

Ruth Harriett Jacobs Ph.D.

Topic: *"Older Women Surviving and Thriving: A Manual for Group Leaders"*

A training manual was developed and published nationally by *Family Service America* for leaders of older women's groups. The manual includes instructions for 12 workshops in areas such as activities, personal relationships, sexuality, financial management, living arrangements, and health care.

William Kavesh, M.D.

Topic: *"Health Care Teams: A Cost Effective Approach To Improving Nursing Home Care"*

A review was conducted to examine the cost and care effectiveness of using medical teams (physicians, nurse practitioners, physician assistants) to serve nursing home residents. The project was conducted in response to the rising costs of nursing home care.

1986 Community Fellows

Elba Caraballo, M.S.W., doctoral candidate
Topic: *Economic Issues of Older Women: An Exploration of the Field*

A review of the literature about the economic status of women was undertaken and a report produced which highlighted the need for additional research. In addition, a study group was initiated which involved a group of women leaders and scholars.

William Crown, Ph.D.
Topic: *"The Economic Status of Boston's Aged: A Decade of Change"*

An analysis of the 1974, 1977, and 1981 income data for Boston's elderly was conducted in order to examine trends in the economic status of older persons in Boston and the effects of state and national policies on the economic well-being of this group.

Linda Dumas, M.S./M.A.
Topic: *"Home Care for Columbia Point Elders: Implementing a Preliminary Outreach Program"*

A needs assessment was conducted of elderly residents in the Columbia Point Public Housing Project, Dorchester section of Boston. The project was carried out in conjunction with the School of Nursing, University of Massachusetts at Boston, and focused on physical, psychological and socio-economic needs.

Patricia Edraos, J.D.
Topic: *"Coordinating the Delivery of Elderly Health Care By Community Health Centers"*

Development of an elderly care services group was undertaken to analyze health care needs of elders and to design a plan for implementing a pre-paid elder care services program within the community Health Care system.

Janice Gibeau, Ph.D.
Topic: *"Breadwinners and Caregivers: Working Patterns of Older Women Caring for Dependent Elderly Family Members"*

An exploratory study was conducted examining how older women who are employed full-time in the labor force manage their work lives while also serving as primary caregivers for dependent elderly family members.

Esther Kaplan
Topic: *"Elders and the Arts in Action: Programs That Work"*

A survey of elder art projects in the United States was conducted. Information was collected including project descriptions, objectives, and activities, collaborators, models, and contact persons for community art programs serving the elderly.

Phyllis Silverman, Ph.D.
Topic: *"Critical Transitions in the Lives of the Elderly"*

A descriptive study of how older widows and widowers are influenced by the death of their spouse. The differences between men and women in this situation were examined. In addition, the report explored how affiliations with mutual support groups affect the way people cope.

Margie Smigel
Topic: *"Past a Certain Age: An Original Film Project"*

A film project was undertaken featuring three 80 year old actresses. The film focused on the ambitions, hopes, and dreams of the women to demonstrate that age is not an inhibitor of creativity.

Louise Waring and Elaine Frieden
Topic: *"A Study of Employment Needs of Older Adults in Greater Boston"*

A statistical analysis and description of 1,873 jobs seekers age 55 and over who utilized Operation ABLE's employment services during 1983-1986 was completed. The purpose of the study was to assist Operation ABLE in an evaluation of the services provided to this population group. Factors reviewed included age, income, and educational levels, occupational characteristics, community residence, and a comparison of local job seekers to a national profile.

1987 Community Fellows

Eileen Bogle and Albert Cennerazzo
Topic: *"Minority Usage of Home-delivered in Southwest Boston"*

An analysis of the Hispanic community usage of home-delivered meals was conducted including methods for eliminating perceived and real barriers to participation. This study formed the basis of an agency effort to increase outreach, information, and participation in the program.

Joseph Doolin, M.S.W.
Topic: *"Old, Poor, and Alone: Support Systems for Older Residents of Lodging Houses and Public Shelters in Boston"*

This research study provides an analysis of 50 in-depth interviews with elderly shelter and lodging house residents as well as observations of an additional 100 persons recorded over a three-year period. Research includes description and analysis of social support systems, economic resources, and life histories. The purpose of the project was to examine the impact of poverty over time on the elderly; to provide additional data on homeless older adults in Boston; and to create a greater awareness of the need for services to homeless elders.

Marian Darlington Hope, M.C.P., doctoral candidate
Topic: *"Assessing Crime Prevention Models Among the Elderly"*

An assessment of crime prevention strategies and models employed by senior centers and police departments was conducted. A comparison of crime prevention activities to actual crime victimization rates by the types of crimes most committed on the elderly was also completed.

Susan Jacobson, R.N., M.S.
Topic: *"Informed Consent to Neuroleptic Treatment and Competency in Geriatric Nursing Home Patients"*

An analysis of research data concerning neuroleptic treatment and competency in geriatric nursing home patients was completed. Findings indicate that elders in nursing homes are not treated equally under existing state law with regard to the uses of neuroleptic medication.

Aluma Motenko, M.S.W., doctoral candidate
Topic: *"The Gratifications and Frustrations of Older Women Caring for a Spouse with Alzheimer's Disease"*

A research survey of 50 women providing care to a spouse with Alzheimer's Disease was conducted to test the importance of marital bonding to caregiver well-being. Data analysis identified the at risk factors of spouse caregivers in order to affect public policy with respect to institutionalized versus home care support services.

Darlene O'Connor, Ph.D.
Topic: *"Elders and Higher Education: What Motivates Older Students"*

A survey was completed of middle-aged and older students examining determinants of educational choice. In particular, the research focused on the extent to which tuition waivers for persons aged 60 and over in Massachusetts motivated older lower-income adults to participate in higher education.

Georgia Sassen, Ph.D.
Topic: *"Ethnicity and the Elderly: A Training Series for Homes Care Case Managers"*

A training program, co-sponsored with the Gerontology Institute, was developed and offered to case managers of Eastern Massachusetts home care agencies. The series provided participants with new methods for reaching minority elders and elders from different ethnic backgrounds, understanding cultural differences and attitudes, and engaging family networks in multi-cultural communities.

The 1988 Community Fellows have been selected and their projects are underway.

THE ALUMNI FELLOWS PROGRAM

In 1985 the Alumni Fellows Program was established for the purpose of providing graduates of the Gerontology Certificate Program an opportunity to undertake individual projects in applied research, policy development, or advocacy in the field of social gerontology. Fellowships are awarded on a competitive basis by the Institute. Each Alumni Fellow is required to complete a specific product within a year. A stipend is awarded to each Fellow along with access to the support services of the Institute.

A listing of the Alumni Fellows and their projects follows:

1985 Alumni Fellows

Lillian Clough
Research and development of a voluntary transportation system for older persons in a suburban community

Barbara Dwyer
Editing and publishing the oral histories of three prominent Americans

Sister Paschala Noonan
Development of a public information brochure for the Gerontology Institute

Mary Samp
Research and development of a legal rights training project involving older people

Grace Smith
Research and development of a radio program targeted at older people

James Williamson
Development of information materials concerning resources available to hearing-impaired older persons

1986 Alumni Fellows

Jack Betterman
Exploration of continuing educational opportunities for older Americans

Rima Gurvitz
An examination of the disengagement theory: myth or reality

Harold Reinstein
Reminiscence—its theory and use as a social and therapeutic tool for the elderly

Julia Ruiz
Resource development for Hispanic elderly in Cambridge

1987 Alumni Fellows

Dorothy Clifford

Interviews with residents of Level IV nursing homes in the city of Boston

Eleanor Condon

Economic and adaptation resources for the aging homeowner

Louise Kragelund

An examination of how aging is affected by generational differences

Barbara Krentzman

Development of a local National Issues Forum organization

The 1988 Alumni Fellows have been selected and their projects are underway.

Scholarly Activity

In addition to providing assistance and guidance to Fellows, the Institute staff has also been actively involved in its own academic endeavors. A listing of these efforts follows:

BOOKS

A book: *Retirement Reconsidered: Social and Economic Roles for Older People.* New York: Springer Publishing Company. 1988.

JOURNAL ARTICLES AND CHAPTERS

Faculty from the Institute will edit a new journal entitled the *Journal of Aging & Social Policy* to be published by Haworth Press. The first edition of the quarterly is scheduled for release in early 1989.

"The Dynamics of Change: Toward a New Paradigm of Work and Age." In *Retirement Reconsidered: Social and Economic Roles for Older People.* New York: Springer Publishing Company, 1988.

"Education for New Productive Roles for the Elderly." In *Retirement Reconsidered: Social and Economic Roles for Older People.* New York: Springer Publishing Company, 1988.

"On Income Inequality Among the Elderly: Its Potential Impact on a Learning Society." *Generations,* Vol. XII, No. 2, Winter 1987-88.

"Elders and Higher Education: Instrumental or Expressive Goals?" *Educational Gerontology,* Vol. XIII, No. 6, 1987.

"Women and Retirement Planning: The Development of Future Connections, Inc." In *Pre-Retirement Planning in Midlife Women in the United States.* New York: Springer Publishing Company, Fall, 1988.

"Tomorrow's Able Elderly: Implication for Policy and Practice."
The Gerontologist, Vol. 27, No. 4, 1987.

"University and Community Partnership: Developing Linkages for Quality Gerontological Training and Institutional Experience." *Educational Gerontology,* Vol. 13, No. 4, 1987.

"Matching Educational Opportunities with the Able Elderly." *Lifelong Learning: An Omnibus of Practice and Research,* Vol. 9, No. 5, 1986.

"The Elderly as Surplus People: Is There a Role for Higher Education?" *The Gerontologist,* Vol. 26, No. 1, 1986.

"Seniors Trained to Serve Seniors." *AGING,* No. 362, 1986.

"Hispanic Midlife and Older Women." *Hot Flash,* Vol. 5, No. 3, 1986.

ACADEMIC PAPERS AND CONFERENCE PRESENTATIONS

1987: *Gerontological Society of America, 40th Annual Meeting*

"The Greening of Academic Emeriti"

1987: *American Association for Adult and Continuing Education, Annual Conference*

McClusky Symposium, "Empowering the Elder Adult Through Education"

1987: *The National and Caucus on Black Aging,* Annual Meeting

Congressional Testimony on Poverty and the Elderly

1987: *American Society on Aging,* 33rd Annual Conference

"Lodging Houses: A Research Brief"

"Project Reward—A Best Practice Showcase"

"Economic Issues of Aging"

"Developing Elder Services in Hispanic Communities"

1987: *Association for Gerontology in Higher Education,* 13th Annual Conference

"Building Connections Between University and Community"

"Using Economic Issues of Aging to Teach Concrete Skills to Elders"

"The Development of the Ph.D. in Gerontology"

1987: *Massachusetts Federation of Nursing Homes,* Annual Meeting

"Access to Nursing Homes"

1987: *National Council on the Aging,* 37th Annual Conference and Exhibition

"The Role of Higher Education"

"Preparing Older Adults for Alternative Employment"

"Economic Issues of Older Women: Getting on the State's Agenda"

"Elder Services in the Latino Community"

1987: *Northeastern Gerontological Society,* 5th Annual Meeting

"Assessing Needs, Expanding Roles, and Creating Opportunities in the Aging Community: A Model of Effective Community/University Collaboration"

1986: *American Educational Research Association,* 12th Annual Conference

"Education for the Older Learner: A Model"
"Profile of Older Women"

1986: *Gerontological Society of America,* 39th Annual Scientific Meeting

"The Need for Research on Latino Elders: Impact on Gerontological and Geriatric Education"

"Income and Poverty of the Elderly"

"It's a Matter of Time: A Doctoral Study in Gerontology"

The Clark Symposium, "Towards a New Paradigm about Roles for the Elderly"

1986: *National Council on the Aging*, 36th Annual Conference

"Empowering Older Adults to Grass Roots Action"

"Life Care Communities: Protecting the Consumer"

1985: *American Association for the Advancement of Science*, Annual Meeting

"Revising National Retirement Policy: What Economic Roles for Older Adults?"

1985: *Association for Gerontology in Higher Education*, 11th Annual Meeting

"Models of Effective Coalitions with Higher Education"

1985: *Gerontological Society of America*, 38th Annual Scientific Meeting

What Roles for the Active Elderly in Aging Societies?"

1985: XIII International Congress of Gerontology

"Education of Older People"

"What Roles for the Active Elderly in Aging Societies?"

1985: *International Association of Gerontology*, Pre-Congress Conference

"Issues of the 80's: Practitioner's Perspectives—Education for Older People"

1985: *National Council on the Aging*, 35th Annual Conference

"Empowering the Aging Community—The Role of Higher Education"

1985: *Northeastern Gerontological Society*, 5th Annual Conference

"Older People in Planning for an Aging Society: Advocacy, Education, Research and Practice"

1984: *Gerontological Society of America*, 37th Annual Meeting

"A Framework for Examining Significant Roles for Self-Determination"

1984: *Family Service of America*, New England Regional Meeting

"The Future of our Service Delivery System for the Elderly and their Families"

1984: *Association for Gerontology in Higher Education*, 10th Annual Meeting

"Beyond Multi-Disciplinary: An Exploration in Outcome Learning in Gerontological Policy"

"Emeritus Professors Engagement and Involvement"

Technical Assistance and Consultation

Since its inception, the Institute has demonstrated its commitment to community service by providing technical assistance and consultation to a variety of community organizations, agencies, governmental units, and groups involved in issues concerning the elderly. The Institute's involvement ranges from provision of technical assistance in management and resource development to assistance in policy evaluation and research. Again, older persons trained by the Institute have participated directly in many of these efforts.

A selection of the types of organizations assisted and the support provided by the Institute follows:

ORGANIZATION	*TECHNICAL ASSISTANCE PROVIDED*
La Alianza Hispana Roxbury	Developed client profile; analyzed census data; designed a computerized management information system; wrote a strategic planning document for the Latino Elder Services Program.
Operation ABLE Boston	Developed and implemented a survey research project of minority clients of ABLE to determine barriers to employment of older Black adults in the City of Boston. Conducted a literature review and interviewed representatives of community agencies and churches.
Kit Clark Senior House Dorchester	Provided organizational support and technical assistance in the development of a successful national grant application to the Robert Wood Johnson Foundation for an inter-generational service credit program.
Riverside/Cambridgeport Community Corporation and *Cambridge Economic Opportunity Council* Cambridge	Provided planning and assistance in the establishment of a task force formed to examine the housing and service needs of neighborhood residents as a follow-up to the community research project completed by the Institute.
Simplex Steering Committee Cambridge	Provided a technical analysis of the changing industrial base in the Cambridgeport Industrial District and its impact on the residential area.

Adaptive Environments Center Boston	Provided technical and planning assistance relative to expansion of state and federal financial support to disabled persons in need of physical environment adaptations. The Institute also co-sponsored a symposium entitled "Financing Adaptive Housing."
Archdiocese Planning Office Boston	Conducted a demographic analysis of several Boston neighborhoods as part of a resource planning process; assisted the Archdiocese's Elder Life Corporation in its planning and development efforts.

Minority Elder Coalition Boston	Provided start-up support and staffing assistance in the development of a coalition focusing on the needs of the multi-ethnic community of Boston.
Massachusetts Teachers Retirement Board Boston	Co-sponsored with the Massachusetts Teachers Retirement Board a formal pre-retirement training project including a series of workshops on retirement planning for public school teachers within five to eight years of retiring.
Project REWARD Framingham	Trained 14 older persons to conduct a community survey of 175 households age 55-74 to identify the needs and interests of persons approaching retirement and those recently retired; completed an analysis of the data and presented a final report and recommendations.
The Emeriti Collaborative Boston	Facilitated establishment of an Emeriti Collaborative for retired academicians from universities and colleges in Greater Boston who wish to make their expertise available to organizations in the area.
Future Connections, Inc. Boston	Provided technical assistance in the incorporation and development of a non-profit organization, Future Connections, Inc., operated by Gerontology Program graduates, themselves retired. The purpose is to provide career development and retirement planning assistance to individuals and groups who traditionally have not had access to such services. (See Appendix D).
Boston Edison Company and *Community Energy Partnership Inc.* Boston	Conducted a survey of 135 households in Eastern Massachusetts which utilized the energy conservation services offered by Community Energy Partnership Inc. on behalf of Boston Edison to determine levels of customer satisfaction and future program direction.

Institute staff have also served as active members of various elder organizations and task forces including the following:

Nursing Home Omnibus Legislative Task Force

Massachusetts Long-Term Care Data Base Advisory Board

Homes Initiative Task Force, Adaptive Environments Center

Interfaith Task Force on the Spiritual Well-Being of Institutionalized Elderly.

Massachusetts Executive Office of Elders Affairs Task Force on Sliding Fee Payment Structure

Massachusetts Long Term Care Insurance Regulation Task Force

Massachusetts Executive Office of Elder Affairs, Professional Advisory Board

The Elder Housing Alternatives Project Advisory Board, City of Newton

Boston University Home Medical Service, Elders Living At Home Program Advisory Committee

The Boston Aging Concerns Young and Old, Board of Directors

The Boston Affordable Housing Coalition, Property Tax Committee

The Gerontology Institute: Next Steps

As the Institute enters its fourth year of operation it will continue the work and programs it has implemented thus far. In addition, it will carry out a number of new initiatives currently under development. These initiatives include: the creation of the Frank J. Manning Eminent Scholars Chair in Social Gerontology funded by the Massachusetts Legislature; the development of a doctoral program in Gerontology; the development of a research division for gerontological social policy; and the provision of an Advanced Certificate in Gerontology in conjunction with the Public Policy Intern Program.

The Frank J. Manning Eminent Scholars Chair in Social Gerontology

The Manning Chair, established by the Massachusetts Legislature in July 1987 and named in honor of the late elder advocate, will be held by a distinguished scholar with an established reputation in gerontological social policy. The appointment to the Chair is effective in Spring 1988.

A Doctoral Program in Gerontology

This program will emphasize advanced training in social policy, gerontological theory, and research. Its goal is to train researchers, academicians, program administrators, and public policy specialists. It will be among the first in the United States to provide an independent Ph.D. in social gerontology. The doctoral proposal has been approved by the Board of Trustees of the University of Massachusetts and is currently under active review by the Board of Regents of the Commonwealth. wealth.

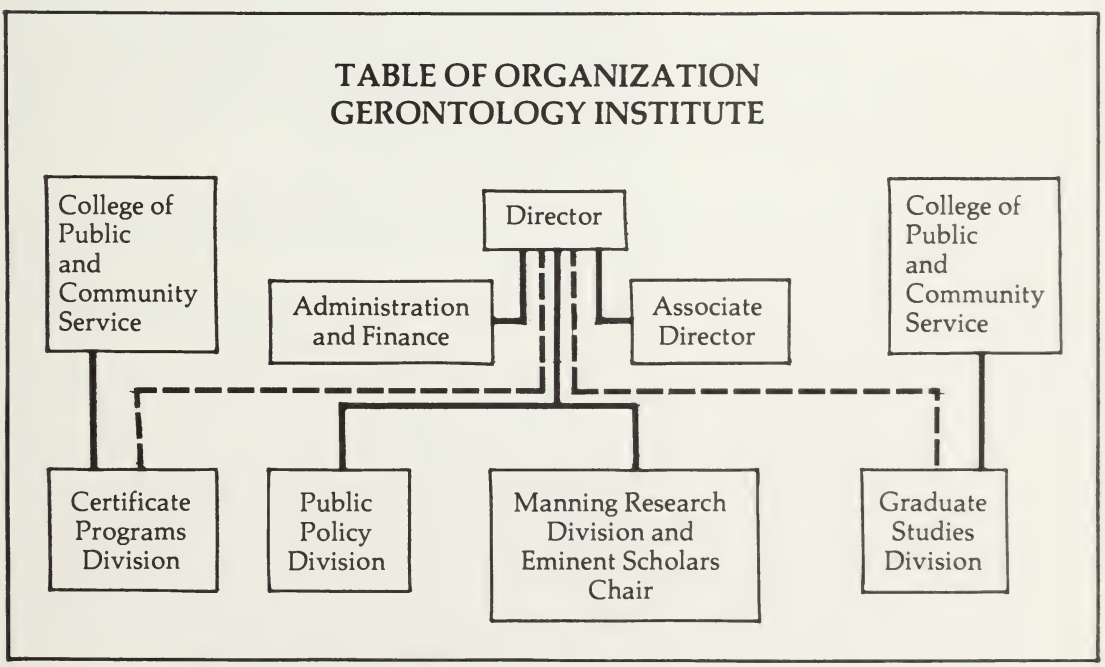
The Frank J. Manning Research Division in Gerontological Social Policy

The Institute has completed the planning phase of the Division's development. Permanent base funding has been secured through the Massachusetts Legislature and a Research Director will join the staff in June, 1988. The goal of the Division is to become a nationally recognized center for research in social and public policy.

The Advanced Certificate in Gerontology

The Institute has gained the approval of the University to offer an Advanced Certificate in Gerontology to be offered to participants in the Institute's Public Policy Intern Program. Those persons who have completed the Gerontology Certificate Program and who successfully complete the required course work and the one-year Public Policy Intern Program may receive up to 24 academic credit hours. The Advanced Certificate is geared to older adults interested in aging and public policy. The Institute has recently initiated the Advanced Certificate and the first group of 45 elders will graduate in May, 1988.

To accommodate the expansion of its programming, the Institute has structured its operation into four divisions. The organization of the Institute effective January 1988 is as follows:



APPENDIX A
The People of the Institute

STAFF

Director	Scott A. Bass, Ph.D.
Associate Director and Director of the Public Policy Division	Paul Houlihan, M.A.
Frank J. Manning Eminent Scholars Chair in Social Gerontology	Yung-Ping Chen Ph.D.
Administrative Assistant	Sylvia Armstrong
Director, Frank J. Manning Research Division	Francis G. Caro, Ph.D.
Assistant Director, Gerontology Program	Patricia Schell, M.A.
Program Developer, Public Policy Division	Marian Saunders
Research Associate	Elba Caraballo, M.A., M.S.W.
Research Assistant	James Williamson, M.A., Sp. Ed.
Staff Assistant	Alberta Malovich
Secretary	Emily Brewster

SENIOR FELLOWS

Several individuals have been invited by the Institute to serve as Senior Fellows. These are persons who have had long and distinguished careers in their various fields of endeavor. The Senior Fellows provide technical assistance to the Institute and its programs as well as continue their scholarly and practical work in the field of aging. The Institute's Senior Fellows are:

Justin Gray, M.C.P.
City planner
Founder and principal, Justin Gray Associates
Former Assistant City Manager, Cambridge, Massachusetts
Former Deputy Assistant Secretary of Housing and Urban Development, Washington, D.C.
Former Commissioner of the Massachusetts Housing Finance Agency

Robert Morris, D.S.W.
Emeritus Kirstein Professor, Brandeis University
Former Professor of Social Planning, Brandeis
Former Director, Levinson Policy Institute, Brandeis
Lecturer, Harvard University School of Public Health
Past President, Gerontological Society of America
Recipient of 1987-88 Donald Kent Award, Gerontological Society of America

Author of 10 books and numerous articles in the fields of social policy, planning health care, and aging.

Franklin Ollivierre, M.A.

Regional Director, New England, Administration on Aging, U.S. Department of Health and Human Services

Former Human Rights Coordinator and Special Assistant, Office of Economic Opportunity, Boston Region

Rosamond Rosenmeier, Ph.D.

Professor Emerita, University of Massachusetts at Boston

Coordinator of Support Services Gerontology Certificate Program

Former Chairperson, Center for Applied Language and Mathematics, University of Massachusetts at Boston

Consultant in teaching of writing and reading to adult, nontraditional students.

CONSULTANTS AND AFFILIATED PERSONNEL

Jacqueline Anapolle	*Public Policy Specialist*
Mildred Bloom	*Photographer*
Mark Chavous	*Photographer*
Robert Dines	*Computer Consultant*
Joseph Doolin, M.S.W.	*Research Associate,* Director Kit Clark Senior House
Evangeline Dumont, M.S., R.N.	*Research Assistant,* Coordinator Future Connections, Inc.
Floyd Gallegos, M.C.P.	*Research Assistant*
Carol Greenfield, Ph.D.	*Director,* New England Benefits Council
Elsie Harper	*Research Assistant*
Patricia Harvey, Ph.D.	*Associate Professor,* College of Public and Community Service, University of Massachusetts at Boston
Winnie Hernandez, M.P.A.	*Research Assistant*
Lawrence Kirsch, M.A.	*Director,* Consumer Health Advocates, Inc.
Janet Logan	*Research Assistant*
Mary Lyons	*Editor,* Alumni News
Joan Madden	*Research Assistant*
Terrence McLarney	*Assistant Professor,* College of Public and Community Service, University of Massachusetts at Boston
Cynthia McKeown	*Legal Specialist,* Law Center, University of Massachusetts at Boston

Allan Meyers, Ph.D.	*Associate Director*, Boston University School of Public Health
Lesego Malepe, M.A.	*Computer Training Consultant*
Ann Marie Mikols, M.P.H.	*Research Assistant*
Sister Paschala Noonan	*Research Associate*
James O'Brien	*Editor*
Ralph Ragsdale	*Photographic Consultant*
Michael Raskin, Ph.D.	*Computer Specialist*
Melanie Thon	*Research Assistant*
Karen Wellenkamp	*Graphics Consultant, Prismgraphics*
Jean Weinberg, M.A.	*Training Consultant*
Alice Wilkinson	*Staff Assistant*
B. June Williams, Ph.D.	*Staff Assistant*

APPENDIX B
Public Policy Interns

1985-1986

HOUSING

Ann Aldort
Angela Brown
Dorothy Cyr
Barbara Dwyer
Joanna Henry
Lillian Owirka
Justin Gray, Supervisor

LEGAL RIGHTS

Jack Betterman
Ruth Dorfman
Frances Cramer
Barbara Krentzman
Judith McDonald
Elizabeth Scheinfein
Terrence McLarney, Supervisor

HEALTH CARE POLICY

Harriett Cherazie
Dorothy Dillon
Florence Prives
Grace Remy
Patricia Schell
Lawrence Kirsch, Supervisor

HOUSING *1986-1987*

Ann Aldort
Dorothy Cyr
Oliver Farnum
Rachel Glick
Elynor Kelly
Justin Gray, Supervisor

OLDER WOMEN'S ECONOMIC ISSUES

Rita Brunelle
Helen Fillmore
Helen Gale
Nita Goldstein
Grace Smith
Annette Rosen
Elba Caraballo and Jean Weinberg, Supervisors

LEGAL RIGHTS

Ellen Anderson
Barbara Gloss
Anna Harris
Jack Pizer
Eugene Pomfret
Irma Romines
Elizabeth Scheinfein
Manual Weiner
Terrence McLarney, Supervisor

DEMOGRAPHICS *1987-1988*

Rebecca Dorson
Dorothy Leak Neblett
Jacob Pizer
Harold Reinstein
Joseph Doolin, Supervisor

HEALTH CARE POLICY

Margaret Amirault
Brother Guy Behenna
Janet Bradley
Sister Mary Cornwell

Margaret Doherty
Mary Grant
Sister Anna James
Eva Rachin
Philip Shiff
Elba Caraballo, Supervisor

LEGAL RIGHTS

Ellen Anderson
Jan Bloom
Elynor Kelly
Jacob Pizer
Dorothy Reed
Irma Romines
Cynthia McKeown and Terrence McLarney,
Supervisors

OLDER WOMEN'S ECONOMIC ISSUES

Joyce DeLuca
Barbara Gloss
Sister Mary McGovern
Lois Myers
Hilda Schwartz
Jean Weinberg, Supervisor
Nita Goldstein, Co-trainer
Annette Rosen, Co-trainer

HOUSING AND COMMUNITY DEVELOPMENT

Dorothy Carter
Eleanor Condon
Ruth Dorfman
Rebecca Dorson
Barbara Dwyer
Oliver Farnum
Dorothy Gaughan
M. Rita Kelly
Frances Rubin
Alice Wilkinson
Justin Gray, Supervisor

APPENDIX C
The Federal Study Program Participants

1986

Ann Aldort
Rebecca Dorson
Oliver Farnum
Mary Flannelly
Eugene Pomfret
Marian Saunders

1987

Brother Guy Behenna
Sister Mary Cornwell
Nita Goldstein
Lillian Moore
Eva Rachin
Philip Shiff

APPENDIX D Future Connections, Inc.

Future Connections, Inc. is a non-profit organization initiated by the Gerontology Institute to provide informational seminars to persons for whom traditional retirement planning services are not available, including health care workers, manufacturing and industrial workers, and state and municipal employees. The organization is run by graduates of the Gerontology Program who have themselves experienced successful transitions.

PERSONNEL

Ann Aldort
Eleanor Condon
Evangeline Dumont
Bernice Kahn
Louise Kragelund
Nuna Mayo
Sr. Laura Oliveira
Lillian Owirka
Eugene Pomfret
Marie Prata
Paul Rosen

APPENDIX E
Sources of Support

Commonwealth of Massachusetts—State Budget
1984-1987

Close-Up Foundation
1985-1987

Farnsworth Trust
1985-1987

Boston Foundation
1986

Villers Foundation
1986

William Monroe Trotter Institute
1986

Asociacion Nacional Pro Personas Mayores, Los Angeles
1987

Bank of Boston
1988

APPENDIX F Conferences/ Symposia/ Events

Since its inception the Institute has sponsored and co-sponsored a number of public events focusing on the issues of aging. These include:

CONFERENCES

"Who Care for the Caregiver." Co-sponsored with the Archdiocese of Boston Elder Life Corporation and the Massachusetts Executive Office of Elder Affairs. (November 1984)

"Nutrition and the Elderly." Co-sponsored with the Massachusetts Association of Older Americans, the Massachusetts Association of Elderly Nutrition Programs, the Massachusetts Executive Office of Elder Affairs, and the U.S. Administration on Aging. (May 1985)

"Access to Nursing Homes—The Experience of Families." Co-sponsored with the Massachusetts Association of Older Americans, the Massachusetts Nursing Home Federation, and Living Is For the Elderly (LIFE). (May 1986)

"An Emergency Briefing on the FY 1987 Federal Budget." Co-sponsored with OMB Watch, the Speaker of the Massachusetts House and Senate President, and the Massachusetts Human Service Providers Council. (May 1986)

"The Impact of DRGs: Facing the Challenge Together" Co-sponsored by the Commission on Affairs of the Elderly, City of Boston, with the Gerontology Institute (June 1987)

"No Place Like Home—Financing Adaptive Housing" Co-sponsored by Adaptive Environments Center with the Gerontology Institute, the Federation for Children with Special Needs, The Massachusetts Association of Independent Living Center, the Office of Handicapped Affairs, and the Massachusetts Association of Older Americans. (June 1987)

SYMPOSIA

Principal guest, *Dr. Fernando Torres-Gil,* Staff Director, Select Committee on Aging, United States House of Representatives presented a report on policy and budgetary trends in aging-related programs at the federal level.

Principal guest, *Dr. Jacqueline Jackson,* Duke University, presented a lecture on "The Demographics of Aging in the Minority Community."

Principal guest, *Dr. James Birren,* Director, Andrus Gerontology Center and Director, Leonard Davis School of Gerontology, UCLA, presented a critique of, and recommendations for the development of a doctoral program in gerontology.

Principal guest, the *Honorable Branford Taitt,* Minister of Health, Barbados, lectured on the state of public health delivery in Barbados.

Principal guest, *Thomas Simon,* Director of the Friends of the German Democratic Republic—U.S.A. Program, lectured on programs and services for the aged in the GDR.

EVENTS

Produced 30 second public service announcement for media distribution entitled *Still Growing.* (October 1985)

Reception for, and presentations to leaders in the field of public policy and academic research at the *Association for Gerontology in Higher Education* Conference. (March 1987)

Tribute in the Massachusetts State Legislature in honor of *Frank J. Manning* and the establishment of the *Manning Chair* at the University of Massachusetts at Boston. (November 1987)

The Gerontology Institute wishes to acknowledge and thank the following persons for their assistance in development of this report:

Elizabeth Donovan, Drafting and Editing

Emily Brewster, Typing

Karen Wellenkamp, Graphic Design/Production

Ralph Ragsdale, Photography

Villanti & Sons, Printing